

## PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3298



April 7, 2009

Andrew McAllister, Program Manager  
California Center for Sustainable Energy  
8690 Balboa Ave., Suite 100  
San Diego, CA 92123-1502

Re: Approval for The 2009 California Solar Initiative Interim Marketing and Outreach Plan

Dear Mr. McAllister:

This letter conditionally approves the 2009 California Solar Initiative Interim Marketing and Outreach Plan and \$500,000 annual budget proposal submitted by California Center for Sustainable Energy on December 15, 2008 in accordance with D.07-05-047.

Energy Division Staff has provided direction on implementation of the plan so it best integrates with other statewide activities, such as advanced metering. During review of CCSE's M&O plan, it was decided to not approve additional video projects at this time, as it is believed that the requirements of the Decision have been adequately addressed with video already developed by Program Administrators. Please refer to "Attachment A: Energy Division Staff Implementation Notes and Request for Additional Follow-up" for further direction on activities and budget allocations.

Staff recommends a standardized M&O activity approval request form based on the approval process for CSI M&O materials that records estimated and actual costs of M&O Projects. This form is described in detail in "Attachment B: CSI Interim M&O Approval Procedures. Interim M&O materials and budgeted activities that do not receive approval prior to expenditure are subject to disallowance. Please submit this form when making approval requests from Energy Division staff.

Sincerely,

A handwritten signature in blue ink, appearing to read "Julie A. Fitch".

Julie A. Fitch  
Director, Energy Division

Attachments: Energy Division Staff Implementation Notes; M&O Approval Guidelines  
Cc: R.08-03-008 Service List

## **Energy Division Staff Implementation Notes and Request for Additional Follow-up for the 2009 California Solar Initiative Interim Marketing and Outreach Activities**

Refer to Interim M&O Approval Procedures, attached to this document, for instructions on how to submit collateral for Energy Division approval prior to distribution and expenditure.

### **Staff Recommendations to CCSE Interim M&O Activities**

The following activities are hereby approved, with implementation notes:

1. Training and Education \$100,000 CCSE is advised to provide the Energy Division with a schedule detailing all trainings and workshops within 30 days of this approval.
  - CCSE is instructed to maintain a database of class attendees, and develop strategies to follow-up with attendees.
2. Coordination with SDG&E utility customers
  - Staff encourages open communication and, when possible, collaboration with SDG&E to deliver regular, efficient and actionable CSI messaging to SDG&E customers.
3. Direct Mail \$20,000
  - Staff understands CCSE's position with regard to billing inserts and the use of SDG&E's customer data, and requests that CCSE meet with Energy Division to discuss targeting procedures for direct mail campaigns within 30 days of this approval letter.
  - CCSE is directed to develop follow-up strategies for direct mail campaigns to determine campaign effectiveness and to assess further informational needs of the target audience.
  - CCSE may integrate solar/CSI Program messaging with other DSM programs to share costs of direct mail.
4. Interactive Outreach \$10,000
  - Staff re-emphasizes the importance of coordination, when possible, with SDG&E. One suggested area of coordination that CCSE might explore is through internet links (such as banners on relevant pages) between CCSE's and SDG&E's websites.
5. Radio/Television PSAs \$100,000
  - CCSE must submit scripts/stills/recordings of PSAs to staff for approval per Approval Guidelines, attached, or activity will be subject to disallowance.

6. Newspapers/Magazines \$30,000

- Staff suggests that in addition to advertorials, CCSE develop a pro-active press strategy to ensure the CSI Program gets increased coverage in local media as often as possible. Please maintain a list of media coverage to provide Energy Division Staff with periodic updates.

7. Monthly Electronic Newsletter \$30,000

- CCSE is required to purchase email credits from the vendor, Vertical Response, when needed to fulfill distribution.

8. Printed collateral \$25,000

- Staff encourages as much coordination as necessary with SDG&E to ensure that its customers are receiving timely and useful CSI information.

9. Online training sessions and resources \$30,000

- Provide a request for approval prior to this expenditure, in accordance with the Interim M&O Approval Procedures, that outlines the sessions' contents and needed resources.

10. Alliances and Co-Promotions \$35,000

- Provide the Energy Division with a list of alliances and co-promotions as they are developed, and follow the approval procedures prior to expenditures.

11. Bundled Outreach \$15,000

- Follow the M&O Approval Process for both stand-alone and bundled materials, and identify the cost allocation methodology used to determine CSI's portion of the costs.

12. Cooperative Marketing Efforts \$15,000

**Deferred Activities**

1. Video (\$15,000)

- The Program Administrators completed a short video to guide installers through the CSI application process, per the Decision. Further video production will not be addressed at this time. Please provide Energy Division with a plan to reallocate this funding.



## **Additional Needs to be Addressed During the 2009 Interim Phase**

1. **Advanced Metering:**  
To support consumers' evaluation of solar options during the advanced meter rollouts scheduled per R.02-06-001, the Advanced Metering Initiative (AMI) Staff requests that CCSE identify opportunities to provide CSI messaging—perhaps as part of an integrated DSM effort—to customers during key touch-points as the new meters are deployed under AMI.
2. **Community Outreach:**  
The evolving solar market requires integrated approaches for marketing and outreach to be fully effective, and supports CCSE's approach to flexible, "grass-roots" community outreach, alliances and co-promotions. As in past budget cycles, a degree of fungibility is acceptable for strategic community solar promotion. PAs are directed to submit an outline of events for 2009 and bundled outreach opportunities that will be expensed to this account.
3. **Branding:**  
To support the value of the Go Solar California brand, PAs must use the GSC logo on all CSI materials and messaging opportunities, following approved logo usage guidelines (available from Energy Division staff.) Staff will provide the appropriate graphic files upon request.
4. **Go Solar PA Portal:**  
Staff encourages CCSE to take "ownership" of its own portal on the Go Solar California website that provides users with high-level CSI information and links to the PG&E website.
5. **Approval Format and Expense Reporting**
  - 5.1. Follow the updated approval process format when submitting materials for Energy Division review and approval. To receive final approval for individual collateral and activities, PAs should provide a file of the proposed material and project details on the Approval Request Form. The format is found in Attachment B: Approval Process. The approval form will enable the CPUC to track and maintain data on all CSI-funded M&O activities, and will be requested in addition to semi annual administrative expense report filings. Please continue to follow the Standardized Expense Reporting Worksheet when itemizing expenses associated with interim M&O activities.

## Attachment B

### CSI Approval Procedure for Interim Marketing and Outreach Materials

In accordance with D.07-05-047, Appendix A, Item 6, "PAs shall send final versions of basic marketing and collateral materials, in the form of program brochures, fact sheets, and general consumer education kits, to the Director of the Energy Division when ready for review." Internet banner ads, radio tags and public service announcements, as with any other M&O materials, sponsorships and media buys, must be similarly reviewed.

All CSI M&O materials, both stand-alone and bundled, must explicitly promote the California Solar Initiative program and adhere to the guidelines set forth to receive approval. The Energy Division will require a minimum of seven days from the submission to approve. Expedited review may be requested on a case-by-case basis in the event of unforeseen deadlines.

Send materials to staff in electronic format:

- To: Amy Reardon,  
Energy Division Analyst  
California Solar Initiative  
[arr@cpuc.ca.gov](mailto:arr@cpuc.ca.gov)
- Cc: Molly Tirpak-Sterkel, Energy  
Division Supervisor  
DG/CSI Section  
[mts@cpuc.ca.gov](mailto:mts@cpuc.ca.gov)

When submitting materials for approval, please identify columns A-F in the following Interim CSI M&O Approval Request Form to provide staff with details about the project:

A	B	C	D	E	F	G	H	I	J
Project Req.Date	M&O Category	Budgeted in M&O Plan	Proj. Cost Est.	Est. Follow- up	Total Est. Cost	Proj. Inv. Date	Actual Proj. Cost	Actual Follow- up Cost	Total Actual Costs
						Date 1			
						Date 2			
						Date 3			

- Column A: Date of Project Approval Request
- Column B: M&O Category. Identify which category from the approved Interim M&O plan this project refers, for example "Web Enhancement" or "Solar Contractor Training."
- Column C: \$ Budgeted. Identify how much was approved in the Interim M&O budget.
- Column D: Project Cost Estimate. Provide estimated cost from vendor, staff time, materials (such as printing,) fulfillment, shipping, storage or any other costs estimated within the total project.

- Column E: Estimated Follow-up costs; Identify estimated costs associated with follow-up practices such as a dedicated URL, phone number, mail follow-up, call-backs, email follow-up, offer fulfillment, or other follow-up costs for the project.
- Column F: Total Estimated Costs. Sum of estimated project and follow-up costs.

When project is completed, please submit the completed columns G-J:

- Column G: Project Invoice Date. This is the date that any final invoices are received by the PA from the vendor or the day that associated costs are expensed. If portions of a project are expensed at different times, PAs should submit iterative updates.
- Column H: Actual Project Costs. Identify the actual costs expensed to the CSI M&O Budget, including final invoices, staff time and other costs.
- Column I: Actual Follow-up Costs. Identify the actual costs associated with follow-up activities for the project.
- Column J: Total Actual Costs. This is the sum of all invoices and costs, including follow-up costs, incurred by the projects.

Please maintain a running log of all 2009 Interim M&O activities.

Materials will be reviewed based on but not limited to the following criteria per D.07-05-047:

1. Stand-alone materials should be patterned after materials on the "GoSolarCalifornia" website. Currently, PAs have adopted the "blue sky" motif seen throughout the website, using blue/cloud, yellow and white.
  - a. All CSI materials, both bundled and stand-alone, must bear the Go Solar, California logo. Please refer to the GSC Logo Guidelines, Attachment C.
2. The materials must, whenever possible, reference the program administrator's role in the program.
3. Content must mention energy efficiency audit requirements to promote State guidelines and proper system sizing.
4. Text must refer readers to the GoSolarCalifornia website in addition to the PA website and other contact information.

In addition to the above, the ED has discretion to approve and suggest modifications to materials if they do not conform to the order or to the PA's approved Interim M&O plan. Notice of approval or instructed revisions will be sent to the PA via email.

Any expense for activities or materials that is not expressly called out in the approved M&O plan and/or approved by the Energy Division in advance is subject to disallowance.